



# Learning from experience



**A manual for organising,  
analysing and documenting  
field based information**

Jorge Chavez-Tafur, with Karen Hampson, Anita Ingevall and Rik Thijssen

Cover photo courtesy of Eefje den Belder, Martín García and Don Jansen.

Design and layout: Jan Hiensch, Leusden

Print: Koninklijke BDU, Barneveld

© ILEIA, Centre for Information  
on Low External Input and Sustainable Agriculture  
P.O. Box 2067, 3800 CB Amersfoort, The Netherlands  
[ileia@ileia.nl](mailto:ileia@ileia.nl)  
[www.ileia.info](http://www.ileia.info)

March 2007

# Acknowledgements

This manual is the result of the Documentation Pilot Project run by ETC Andes and ILEIA. The content was developed over several years, and finalised during implementation of the Project. We would like to express our gratitude to all those who took part in trying out this method in Peru, including: the personnel of the *Centro de Estudios e Investigación de la Selva Alta* (CEDISA) in Tarapoto; the teams in Tumbes, Piura and Lambayeque of INRENA's *Proyecto Algarrobo*; the personnel of the *Instituto de Manejo de Agua y Medio Ambiente* (IMA) in Cusco, of FAO's Integrated Pest Management Project in Peru, and of the various teams in charge of CARE's Programa REDESA (*Redes Sostenibles para la Seguridad Alimentaria*).

Special thanks go to the students following the M.Sc. course "Agricultural Innovation for Rural development" at the Universidad Agraria de La Molina, Lima, and to the participants of the Documentation Pilot Project: Iveth Paz (UMSS, Cochabamba, Bolivia), Marta Madariaga and Marcos Easdale (INTA, Bariloche, Argentina), Teresa Santiago and Max García (Arte Natura, Chiapas, México), Mariano Morales (INIFAP, Oaxaca, México), José M. Borrero (CELA, Colombia), Adriana Galvao Freire (AS-PTA, Brasil), Alvaro Acevedo (Aldeas Infantiles, Tolima, Colombia) and Javier Arece (EPPF "Indio Hatuey", Matanzas, Cuba).

We are also grateful to the members of the different field teams of the AME Foundation (Bangalore, India) who went through the methodology, and to Mbawa Kivuyo, Jerome Maimu, the VECO staff in Same and the IADO team in Isangati, Tanzania, who actively contributed to improve the process described here.

# Learning from experience:

A manual for organising,  
analysing and documenting field  
based information

Jorge Chavez-Tafur, with Karen Hampson, Anita Ingevall and Rik Thijssen

# Contents

<b>Foreword</b>	<b>7</b>
<b>Introduction</b>	<b>9</b>
<b>Documentation of experiences</b>	<b>11</b>
Principles	13
Issues to consider	14
<b>The method, step-by-step</b>	<b>15</b>
1. First things first	15
2. Setting the boundaries	17
3. Describing the project	20
4. The Analysis	23
5. Presenting the results of the documentation process	25
<b>Writing up the document</b>	<b>27</b>
Try this out	31
<b>Further reading</b>	<b>32</b>
<b>Annex</b>	<b>35</b>
The forestry programme in Pulau	42



# Foreword

During the past 24 years, our work with the *LEISA Magazine* has shown that there are many different development experiences taking place all over the world, involving a lot of effort and dedication. The main objective of these initiatives is the fight against poverty, the promotion of human rights, or the development of a more sustainable agriculture. These efforts involve civil society organisations, NGOs, community based organisations, public institutions and people in cities and rural areas. Most of these efforts, unfortunately, remain unreported or little known.

As can be expected, not all these efforts are successful. But in all of them, the will and dedication of those involved leads to interesting results, all of which can be analysed in order to identify successes, limitations, favourable conditions and the overall impact achieved. In other words, every one of these experiences can result in a learning process if it is properly studied by those involved in it. By describing and analysing these experiences it is possible to create a body of practical knowledge based on a given intervention. This practical knowledge can be very useful in many ways. It can help improve the conceptualisation of a given issue. It can also lead to a modification of the working methods used to tackle these issues. If the activities have positive results, these can be easily built on. In addition, this knowledge can also be stored within an organisation or institution to be used by new members of staff, or it can be easily shared with others.

If these learning processes take place, we should be able to expect that the different interventions in the field become more and more effective and that any errors or mistakes are not repeated. With time therefore, we could foresee an improvement in the quality of the many development interventions, resulting in more and more positive outcomes. Sadly, experience shows that this does not happen often enough. On the contrary, these learning processes are few and the practical experience accumulated by those in the field is rarely used as a guide for future actions. In a global context of increasing inequality, worsening conflicts and fewer resources being available for development activities, we need to use our efforts, skills and resources more efficiently.

This realisation has led ILEIA to believe that institutional learning and knowledge building are essential processes. A key issue in these processes is the documentation of what is taking place in the field and what is being achieved through it. ILEIA and its partners have dedicated time and effort during the past few years towards strengthening capacities for documentation, and will now begin a more intensive programme of activities to promote the documentation and systematisation of practices in sustainable agriculture.

This manual is the result of initial activities developed together with our partner in Peru, the *Asociación ETC Andes*. It is an attempt to develop a method which will help people to document their experiences, focusing on the detailed description and analysis of a set of activities carried

out in the field and their results and impact. The method has proved to be adaptable enough to be relevant for many different circumstances – it can be used to document single, short activities, projects, or for longer and more complex programmes. As our work in Latin America and elsewhere has shown, it can be carried out by community based groups or organisations, NGOs, networks or large institutions.

We think that this manual can be a very useful guide for all those who understand the importance of drawing lessons from the activities they are implementing in the field. We do hope it will stimulate field level practitioners to deepen their learning and share this with others in an organised way, and thus to build new and relevant knowledge.

Lastly, a word of caution.... we suggest you use this manual creatively and intelligently, rather than as a recipe book. Let the documentation method proposed here be enriched and blended with other tools, techniques and perspectives. Learning from experience takes many forms, and you will have to develop an approach that suits your own situation best.

We would like to hear from you!

**Edith van Walsum**

Director,

ILEIA, Centre for Information on Low External Input and Sustainable Agriculture



# Introduction

Much has been said and written in recent years about the need to document the experiences of the many different development initiatives taking place all over the world, and thus learn from the successes and failures. Unfortunately, it is rare that time and effort is put into organising, analysing and documenting experiences, for various reasons. ILEIA, the Centre for Information on Low External Input and Sustainable Agriculture, has over the past 24 years contributed to the exchange of field-based information about the experiences of small scale farmers trying to improve their production in an environmentally sound manner. One of the major difficulties related to this aim has been, and remains, the lack of documentation of practical field activities taking place at community level. If achievements, difficulties overcome and learnings are not documented in some form, it is very difficult to share them. It is probable therefore that a lot of interesting information that could contribute to the further development of knowledge on ecologically sound agriculture has been lost, is in a format or language that is not accessible to all, or has not been fully reflected upon and presented.

This manual is an attempt to develop a method which will help people to document their experiences. It builds on the work of those who have written about or been involved in the documentation of development initiatives for a long time, such as for example, Daniel Selener and his team at the International Institute for Rural Reconstruction (Quito, Ecuador), Oscar Jara (from the *Centro de Estudios y Publicaciones Alforja* in San Jose, Costa Rica), Maria de la Luz Morgan and Marfil Franke (*Escuela para el Desarrollo*, Lima, Peru), and Mario Ardon and the PASOLAC team (in San Salvador, El Salvador). It presents a practical method to help you describe and analyse your project, and thus document it fully. Our intention is to show that the documentation process does not have to be a difficult or complicated one.



Photo: Jorge Chavez-Tafur

**Members of the Isangati Agricultural Development Organisation using this methodology to learn from their experience with coffee cloning, at a workshop in Same, Tanzania, September 2006.**

Throughout this manual we use the terms “documentation” and “documentation process”, which should be taken to mean a process which seeks to organise information resulting from a given field project, in order to analyse it in detail and draw lessons from it. The main objective of this process is to generate new knowledge. This is based on the meaning of the Spanish word “*sistematización*”, often used in Latin America nowadays. The corresponding word in English, “systematisation” is not as frequently used. For this reason, we have chosen to use the word “documentation”, but define it with a broader meaning than simply recording information.

In the following pages we outline the principles of the process and the basic conditions which need to be met in order to allow this process to take place. Then we present the steps to be followed. The description of the method is complemented with a full case study, illustrating the steps involved in the process as well as the final product: an article.

Although there are often problems or minor difficulties which arise during the documentation process, we believe that the method presented here can be followed by every institution, programme or project which is keen to learn more from the development efforts it is involved in.

# Documentation of experiences

All over the world, there are many different initiatives being carried out, attempting to improve the living standards of people in rural areas. These initiatives may be concerned with health, water, education, natural resource management or with the development of a more sustainable agriculture. Some interventions are rather straightforward, and the expected result is easily achieved and seen. Others, like the management of natural resources or the development of sustainable production systems, are very complex, can be slow and usually involve many different actors and processes. Results are often less direct and more uncertain. It is therefore necessary to have a flexible and reflective attitude, constantly re-evaluating what is being done and changing activities in order to achieve the intended objectives.

It is important that these activities are documented so that the lessons learnt can be used to further improve the initiatives. If the results of such initiatives are written down and published, it becomes possible to share the information and for others to hear about the experiences and lessons learnt in a particular project.

As mentioned by Selener *et al.*, a method “... that facilitates the description, reflection, analysis and documentation, in a continuous and participative manner, of the processes and results of a development project” can greatly assist in the documentation of field based information. Such a method and approach makes it possible to look in detail at what is being done and to reflect critically on what is being achieved. It will help those involved to see their own project or experience from another perspective. As such, it can highlight the positive aspects of an experience as well as those which could be improved. A detailed documentation process forces us to go through a self-criticism process, and to be open to suggestions and opinions which may come out as a result of the interaction with others. In the end, it helps us to generate knowledge which will improve our practices, activities or project and its results.

In addition, a thorough documentation process can help us to better understand what we are doing, as well as to make the experiences of our project known. By documenting an experience, it possible to share and exchange it with others. This also prevents losing the information and the lessons learnt, once the project has been completed or those involved have started working on something else.

During a documentation process, attempts are made to compile as much information as possible; gathering all the project information normally available (like evaluation documents and reports), as well as the experiences and opinions of those who have been involved in the project (for example, the project staff), or those who have been affected by the project. This information is usually scattered and in many cases it may not even be written down.

But documentation, in this context, refers to much more than just describing what was done or experienced. In order to generate new knowledge, the process must include a critical analysis of the information available as well as of the opinions, judgements or criticisms presented by all stakeholders and participants. This is the basis for learning.

Taking these general points into consideration, the method described in this manual refers to a documentation process which seeks to:

- organise the information available;
- analyse it in detail to understand what has happened;
- draw conclusions which will help generate new knowledge, and
- present the results in the chosen format.

With the method proposed here, the information available and the opinions of those involved is compiled in a number of charts. The charts are then used to develop a document that is printed and distributed, reaching other people. While the final document is often long and detailed, the

results of a documentation process can also be shown in other ways: for example, as an article, where what was done, achieved and learnt is presented in a few pages, or as a video or an electronic presentation, showing the main lessons learnt or highlighting one specific aspect. Deciding how to present the results is, therefore, one of the first steps of the process.



**Participants from Brazil, Mexico and Peru discuss the involvement of different stakeholders in the documentation processes carried out in their countries. ILEIA workshop, Lima, Peru.**

In addition, the method described in this document is adaptable enough to be relevant for many different circumstances – for example, the process can be used to document single, short activities, projects, or longer

and more complex programmes. It can be carried out by community based groups or organisations, NGOs, networks or large institutions. In this manual we use the term “project” to refer to what is being documented, but this could equally be “activity”, “programme” or whatever term is used by the organisation following the documentation process.

## Principles

Probably the most important thing to remember is that a documentation process should try to involve as many stakeholders as possible to truly reflect the different experiences and opinions of all those involved. Knowing that many different people have been involved with a project, and that each one of them will have different viewpoints and interests, it is logical to expect that there will be different opinions regarding what was done and achieved. Rather than aiming to achieve a consensus, it will be easier to identify lessons learnt, and generate knowledge, if this diversity of opinions is taken into account and is fully represented.

This is linked to the basic principle of participation. Though it is true that one person or team always ends up being responsible for a documentation process, we should aim for a participatory process at all times. In this way, we can more easily gather the opinions and viewpoints of everyone involved, thus guaranteeing that the results and conclusions will be accepted by all (and be made use of by all). A participatory process can also be planned to make use of the particular skills of each person; such as searching for secondary information, interviewing the people involved, presenting the information (charts, diagrams, photographs, etc.) or writing in a clear and concise manner.

The general context of the project must also be taken into consideration during the documentation process. This includes time and location, as well as the historical perspective of the situation and the earlier attempts to improve it. On top of this, the social, economic or political aspects which might have influenced the activities and results will also need to be considered.

Finally, we must also balance collecting information with only including what is really relevant. Although we should try to collect as much information as possible, only the information which is directly relevant should actually be used. Not all the available information is directly related to the decisions made or to the main achievements. Neither will all the information contribute to the analysis or the identification of lessons. The attempt to include too much information generally leads to results which are not very useful.

## Issues to consider

A thorough review of many attempts at documentation over the past few years has shown that there are some issues which are important to consider in order for any such process to be successful. These include:

- The importance of strong institutional support. The institution that initiated a certain project must support the documentation process as well as provide the necessary resources. This includes access to information (reports, internal documents related to the project), but also allowing those who are involved in the project to participate in the process of description and analysis.
- The need for all participants to have the necessary time and resources to enable them to participate efficiently. This includes considering the availability of those who were (or are) benefiting from the project, of those who were part of the team but have moved on, or of other key actors whose opinions are particularly interesting: community leaders, authorities or the representatives of other institutions.
- The importance of having an open attitude to the process. The project will not only be described, but will undergo a profound and detailed analysis. To achieve this, it is necessary to have a critical attitude towards the work done and towards oneself, attempting to show things as they really were, and not as we wish they would have been.

The main restrictions to a successful documentation process are usually linked to a lack of time and resources (which, in many cases, is a reflection of a lack of institutional support, although it can also be the result of the amount of activities undertaken). This means that work should be planned in detail, with roles and functions clearly divided amongst all the participants. Another problem is posed by the capabilities of the participants, for as well as a critical attitude towards one's own work, some specific skills are also required: the ability to facilitate a workshop where opinions are exchanged, the ability to interview people, or to record information. Acknowledging that we do not all possess the same skills, it is recommended to make use of each person's particular strength, considering that in most cases we are part of a diverse team of people.

All of this assumes that the participants are sufficiently motivated to be part of the process. The main purpose of the documentation process, the generation of new knowledge, has to be well understood and agreed upon.

# The method, step–by–step

The method we present here is based on the work of several authors and has been tried by different projects and institutions, who contributed to its development. This has proved to be a flexible model, equally effective in a short workshop as over a period of two or three months. The starting point is the selection of a project carried out by a team or group of persons, followed by three stages: setting the boundaries of the project to be documented, describing the experiences and achievements, and then the critical analysis (see Box 1). The idea is to organise the information and the opinions of those involved in the project through a set of charts, which are continuously improved on, adding the contributions of those involved. To have an “organised” set of information makes it easy to determine if it is complete or not. It also facilitates the analysis, an essential step towards the identification of key learning points.

As well as these three main stages, the definition of a starting point and the writing process for the dissemination of results, are also part of this method.

## 1. First things first

Once the decision to document a project or a particular activity has been made, it is necessary to clarify some of the details involved. Before actually starting it is helpful to determine:

- **Who will participate in the process**

After identifying all those who were involved in the project (authorities, farmers, women’s groups, institutions, schools), it is then necessary to decide who it would be useful or relevant to have participating in the process. Some of them may only need to be involved as a source of information.

- **Who will coordinate the process**

Even though the process should be participatory, it is helpful to have a coordinator who is responsible for defining a work schedule, and making sure that it is followed. The coordinator will also ensure that the different activities take place, meetings are called, and objectives are achieved.

- **What resources are available**

As the main obstacles to a successful documentation process are lack of time and resources, the availability of these needs to be ensured from the very beginning. This includes financial

### Box 1: Methodology

1. First things first
2. Setting the boundaries
3. Describing our experience
4. Analysis
5. Writing up the document

resources (staff salaries and other expenditures), but also other material or equipment that may be needed: a van for field visits, office equipment, etc. In addition, it must be very clear how much time participants will need to spend on the process, so that everyone can plan for this.

- **Deadlines**

Linked to the previous items, we need to determine not only how much time we will dedicate to the process, but also the dates by which the different stages need to be completed. To agree on a schedule and establish deadlines is essential for objectives to be achieved.

- **What information is already available**

A description of what was done, as well as accounts of the success or failure of an activity often already exist. It is therefore useful to begin by listing all the available documents, internal documents as well as those that can be provided by external sources.

- **What information needs to be found**

Once we know what information we already have, we can decide what other information we need. At this stage we might need to get in contact with people who were part of the project but are no longer involved. Photographs, maps, or diagrams need to be collected, together with other nonwritten information.

- **What and who is it for**

It is important that all the participants are clearly aware of the reasons behind the process, as well as of what results we hope to achieve. We also need to define who we would like to benefit from the process, as this will affect how we will present the results.

It is also necessary to include a brief presentation of the general framework of the project. This means that the following must be specified as background information:

- **The general objectives of the organisation which is responsible for the project:** the perspective it follows, why it is working in a particular region; the general strategies according to which it organises its activities.
- **The structure of the organisation:** how the work in the field is organised, the makeup of its teams, the basic logistical arrangements.



- **The relationships with other actors:** including grassroots organisations, institutions, authorities, governmental representatives, and financial institutions, among others.

Having completed these initial preparations, the process itself begins with setting the boundaries of the project we intend to describe and analyse.

## 2. Setting the boundaries

By setting the boundaries we actually start the documentation process. The idea is to select the project we are interested in documenting and then specify the main items that must be taken into account, and those that can be set aside. Generally, only one particular project (or line of work) would be described and analysed from among the various work activities of an institution. Therefore, this project needs to be described independently from the rest of the organisation's activities. In order to do this, a chart can be used to clearly identify and present these points, following the example below:

**Table 1a**

Title	Area/ location	Stake- holders	Starting date and duration	Objectives	Strategy/ approach	Compo- nents
						(a) ...
						(b) ...
						(c) ...

- **Title**  
The name of the project to be documented (not necessarily the final title of the document to be presented, but at least a sentence which describes the project).

- **Location**

The area, province, district, community or region where the specific project took place.

- **Stakeholders**

Everyone who was or is involved with, or affected by the project. This is in addition to the project's target group: we must also consider those who were involved in other ways, such as local authorities, government representatives or people from other institutions. It is equally important to include those who carried out the project (team members) in the documentation process.

- **Starting date and duration of the project in question**

The selected period is generally just part of a much longer period of activities, which does not necessarily need to be considered.

- **Objectives**

What did the project want to achieve in general? What was the aim of the work carried out? While looking at a specific project, it is also helpful to identify how its objectives are related to the general objectives or mission of the organisation in charge.



Photo: Karen Hampson

**Discussions between the participants of a documentation workshop often carry on during breaks.**

- **Strategy/approach**

How was the work approached? This column refers to the specific orientation or strategy followed by the project, such as, e.g., a gender-sensitive approach, or one focusing on production chains. These ideas provide the basis for the subsequent analysis.

- **Components**

In this last column we try to show how the project activities were organised, be they according to the main activities, the areas or fields of intervention, or according to the timings and dates. In other words, this shows how the set of activities which made up the project was organised and implemented.

As we can see, the boundaries set must include both time boundaries as well as physical boundaries. This means that the project to be described and analysed during the documentation process must be clearly identified, and the whole process must concentrate on what happened in one particular area. The time boundary must state a starting date (the moment in which the work to be documented started), and also a final date, marking the final moment to be considered in the process.

It is also important to make a clear distinction between the intervention strategy or approach and the regular activities carried out (which will be listed later on). The *Activities* item must show what has been done, presenting a logical sequence of how these activities took place in time. The *Strategy* item refers to the specific guidelines which determined the way in which these activities were developed.

This is also the stage where the project chosen should be put into context, adding three more columns to the previous chart: the general context, the “problems”, and any earlier activities carried out in an attempt to tackle these problems. For those who joined the institution recently, this might be difficult to do, but it will come in useful at the time of analysis.

**Table 1b**

Context	Problems	Previous Activities

- **Context**

In this column it is important to identify the main aspects surrounding the development of the project. These can be economical, political, social, geographical, environmental or other aspects (e.g. local election processes taking place in a particular moment, general migration trends, drought or heavy rainfall conditions, etc.).

- **Problems**

After defining the general context, it is essential to clearly identify the “problem” which the project or set of activities attempted to solve: what issues did the project or intervention respond to? Why was the project initiated in this area?

- **Previous activities**

Finally, this column should mention any previous activities which attempted to solve the stated problems. This generally includes the work of other institutions in other areas, or what has been done previously in the chosen location.

### 3. Describing the project

In the third stage we focus on and describe the project being documented, identifying the activities and achievements during the period of time chosen. At this stage we will describe everything that was done and achieved, including unexpected results, difficulties faced, and all those results or targets that were not reached.

As in the previous stage, a chart such as the one below can be used to organise the information that is already available. This chart can also help in identifying what information is still missing but which we would like to include (for example, the difficulties we came across during field work). This may mean going back to the field to collect this further information, for which it may be necessary to develop questionnaires and checklists.

**Table 2**

Components	Activities	Main achievements	Difficulties faced	Unexpected results
(a) ...				
(b) ...				
(c) ...				

When filling in the chart, the following needs to be included:

- **Components**

These are taken directly from the previous chart: they are the main lines along which the fieldwork was organised. By dividing the project into components we can see how the activities were logically organised according to subject, time or location (preferably, not more than four). The rest of the chart is filled in based on this column.

- **Activities**

In this column we list what was done, in relation to each one of the components – each component may have more than one activity. We will also point out who was responsible, and what part each of the different stakeholders played during each step of the project. Whenever possible, it is useful to include amounts (number of events, number of participants involved), as well as the frequency and location. It is essential to present what actually happened, and not what was planned to happen.

- **Main achievements**

Here we present the results achieved by the intervention or as a result of the activities carried out, bearing in mind the objectives stated in the first chart. Different view-points should be considered at this time, even if it is difficult to reach any agreements among the participants. It is also important not to limit ourselves to numbers or quantitative results.

- **Difficulties faced**

In this column we identify all the problems or negative factors which affected the implementation of the activities, or which prevented us from achieving more or better results. When describing difficulties we should also include any internal problems faced by the institution or programme in charge of the project.

- **Unexpected results**

This column should include those results (positive or negative) which were not a specific aim at the start of the project, but which later proved to be important. The information to be included here needs not refer to one activity or component, but rather to the project as a whole.

While it is not necessary to fill in every cell or square in the chart, the more information we have will give a better end result. Once finished, it provides a full description of the selected project, identify-

ing everything that was done and everything that was achieved through it. This means that all the activities which were part of the project must be presented, and organised sequentially (i.e. showing everything that has been done, the order followed and the importance of each step).

During this stage we must consider the initial objectives of the project and the different viewpoints expressed by all the participants. As much as possible, this list must also include the qualitative aspects of the project.

To be able to draw conclusions from the past performance, we should avoid only presenting positive points, and attempt to be as fair and open to constructive criticism as possible: a document which presents only positive ideas or results will have very little credibility. This is why the “Difficulties” column is important, where problems or negative factors in general must be included. It is important at this stage to bear in mind the difference between difficulties and unfavourable conditions. Difficulties should be included here, but unfavourable conditions should be recorded in the description of the context. (Unfavourable conditions are known before a project

even begins – the weather, for example – while difficulties appear as part of the activity itself.)

The “Unexpected results” column should include all the results achieved that were not an explicit aim of the activities, whether positive or negative. In particular, we should include those results which contributed to achieving the main objectives, bearing in mind that “unexpected” is not the same as “not considered”. We should avoid describing all the results that were not considered while planning the activities, but which we knew beforehand were going to take place.



Photo: Karen Hampson

**All the group participants discuss and decide what should go in Table 2.**

Having identified what took place and what was achieved, we now have a complete description of the selected project. However, the documentation process is not yet complete, as there has not been any analysis. Until now no new knowledge has been presented, only information. It is in order to be able to learn from our experience and present new knowledge that the fourth stage is needed: the analysis.

## 4. The analysis

To enable us to learn from the project as a whole, and make the step from a pure description to a documentation process, we move onto the most important stage: the analysis. This is when the synthesis and critical overview of the project is done, assessing the practices involved, and looking at which objectives were achieved. This stage is not only the most important one in the process; it is also the most difficult. At this stage, opinions, criticisms and value judgments about all that was done and achieved will be compiled and presented.

First it is necessary to define some criteria<sup>1)</sup> to assess the success of the project as a whole. These criteria should be related to the objectives and the strategies outlined in the first chart, and must be agreed upon by the group as a whole. These criteria represent a kind of framework or structure to be used as a general guide in the analysis. It is often advisable to choose three to five general ideas, taking into consideration the project's objectives and strategies. Frequently used criteria include the participation of the local population, the sustainability of the activities or the replicability of the project. If the project has tried to follow a gender sensitive approach, useful criteria might include the participation of women throughout its activities. To define adequate criteria is the first step towards an efficient analysis.

For each criteria, it is then useful to identify some indicators. These are used just as they would be in an evaluation – to measure an idea in detail, and to help us present the most relevant aspects of each criteria clearly. The indicators should also be chosen and agreed upon jointly by all participants. They should seek to include every aspect of the project, taking quantitative as well as qualitative ideas into consideration. An average of three indicators per criteria is enough; each of them is then used to refer to the project and the results achieved, using a chart such as the following one as a model (shown here as an example with two criteria and only some indicators):

---

<sup>1)</sup> These criteria can also be referred to as "parameters" or "domains", as general ideas with which to "look" at the project.

**Table 3**

<b>Criteria 1: replicability</b>			
<b>indicators</b>	<b>positive aspects</b>	<b>negative aspects</b>	<b>unknown aspects</b>
availability of resources			
involvement of the authorities			
...			
<b>Criteria 2: sustainability</b>			
<b>indicators</b>	<b>positive aspects</b>	<b>negative aspects</b>	<b>unknown aspects</b>
generation of own income			
motivation and interest of the population			
...			
<b>Criteria 3:</b>			
<b>indicators</b>	<b>positive aspects</b>	<b>negative aspects</b>	<b>unknown aspects</b>
...			
...			



Everything that has had a positive influence or has contributed to the achievement of a target, as measured by a given indicator, is considered to be a “positive aspect” in the second column. In the same way, everything that had a negative influence or kept the target or objective from being attained, we consider to be a “negative aspect” (see the example in the Annex). The advantage of a chart such as this one is that it forces whoever is doing the analysis to consider all aspects, including the positive and negative ones, which results in better conclusions. It helps not to refer to the results achieved, but rather to the reasons behind these results. In the example in Table 3, for instance, we don’t need to mention how many resources were available. Instead, we need to say why were these resources available, or why not: they were available because the authorities decided to fund a new project (positive aspect); they were not sufficiently available because farmers are unable to pay for a given service (negative aspect).

The fourth column should be used to point out all those facts or events which have happened, or which are going to happen, but which we still do not know how they relate or will relate to the activities in question, and therefore to the results. Some events that are known will take place in the immediate future can be included here (e.g. an upcoming election of new authorities, the approval of a new law, etc.), just as everything that has not been studied in detail until now.

As in the previous chart, it is essential to include the different opinions of all those who were involved in or affected by the project. In addition, it is very important to remember that here we are highlighting the factors which contributed to a particular result, and therefore we do not need to state what these results are. A common mistake made with this box is to mention the results or achievements, which is a repetition of what has already been presented in the previous stage. The analysis needs to look for the reasons behind the results and achievements.

## 5. Presenting the results of the documentation process

Having completed a detailed analysis, the next step involves identifying the main lessons learnt. What do we know now that we did not know before the exercise? This is not difficult to find out if we think of the whole project and look at the positive and negative aspects mentioned for each criteria. Through discussion with fellow participants, while filling up the charts, these important points often become clear. The conclusion of the document will then consist of the main lessons learnt and any recommendations we would give to others doing a similar project.

The next stage is to present the results of the whole documentation process. This can be done in many different ways. Use your imagination to come up with the most appropriate method



Photo: Jorge Chavez-Tafur

**Presenting the filled in charts to the rest of the group during a documentation workshop.**

for your target audience. Many examples were described, for example, in vol. 22.1 of the *LEISA Magazine* (“Documentation for change”, March 2006). These could include posters, photographs, making a video or radio presentation, presenting individuals’ stories, performing a play, or writing a pamphlet, cartoon strip, article, or book. In the next section we will give some suggestions on how to present the results in a written format, as we would like to encourage you to write up the results of your documentation process, and then send them to us!

# Writing up the document

The usual aim of a documentation process is to publish a “document” of some format, and in this way present and share the generated knowledge. This implies a fair amount of editing work, correction of styles, design and printing, and making the final product visually agreeable. But before all that, presenting written information implies a process of writing up the information.

In this last stage, the aim is to present the results of the documentation process in an easily accessible manner which can reach those who may benefit from it directly. As already noted, the results of this process can be presented as a brief article, published in a magazine, or as a video or even as a book. Taking advantage of electronic communications media means that any of these may also reach the users virtually: a book does not necessarily have to be published. In most cases, however, presenting the results of the documentation process requires writing.

Writing, just like drawing, is an art. As such, some people find it easier than others. It would be impossible to expect everyone involved in a project or a documentation process to express the principal ideas in a clear manner, or that all of them can use the language in the best way. Likewise, it would be impossible to provide a recipe which, when followed, would guarantee a well written text. What follows, therefore, are only a few recommendations that may help those who will be presenting their ideas, to do it in the best possible way.

## *(a) Format and layout of the document*

1. **Start with a predetermined outline or framework.** Whether we are thinking of an article or a book as a final product, it is useful to outline the structure it will follow before starting to write (Box 2). In this way it becomes easier to take the information we already have in the charts and “place” it in its appropriate place.
2. **Consider “quotas” for each section,** as a way of determining how much detail will be included. This refers to the number of pages or the space which will be assigned to each one of the sections of the framework. Even if deciding on a number of pages seems to be unimportant, establishing these quotas will help us not to write too much about one particular item, and will force us to look for more information in those cases where we do not have enough.
3. **Consider the relevance of the information** which is being presented at each moment. This is related to the previous point, as we must remember that not all the information we have is directly relevant to the point we want to describe. Depending on the space we have, and on the level of detail we want to show, this often means that we must put aside those data and opinions that do not contribute to our analysis.

4. **Avoid the exaggerated use of titles or subtitles.** On the one hand, it is often unnecessary to give a title to a small section. On the other hand, if the division is necessary, it must be simple and easy to understand – and thus it is better to avoid subdivisions within subdivisions. For example, if chapter 2 is divided into three sections (2.1, 2.2 and 2.3), it would be better to avoid subdividing any of these unless absolutely indispensable. And if it were necessary to do so, the subdivisions should be labelled as (a), (b) and (c) rather than 2.1.1, 2.1.2; or, even worse, 2.1.1.1 or 2.1.2.1
5. **Indicate what is included in each chapter or main section.** After each title, especially in those cases where the text is divided immediately into sections or subchapters, it is useful to point out briefly what will be included in the text. This motivates the reader to read this

section (or if not, at least he knows exactly what he will be missing), even if doing so means there will be more text.

### Box 2: A basic framework for a document

- Title
- Presentation
- Summary
- Contents
- Introduction
  - saying what does the document aim to show, and how is the information presented)*
- General aspects
  - description of the location, the population, the general context and the problem addressed*
- The experience itself
  - a description of everything that was done and all that was achieved (including the difficulties or the problems experienced)*
- The analysis
  - following the chosen criteria and indicators*
- The conclusions
  - including the lessons learnt and some recommendations*
- References
- Annexes

*(b) Language and style of the text*

1. **Use short sentences.** A paragraph consisting of only one long sentence is very difficult to read. It is better to divide it using words such as “In the same way...”, “On the other hand..”, or “On the contrary...”, to start a new sentence on the same subject. Most experts agree that clear writing should have an average sentence length of 15 words in English. It is also a good idea to mix shorter sentences with longer ones, for variety and to make the text easier to understand (see also Box 4 below).
2. **Use active verbs.** Often a sentence can be easier to understand, as well as being more lively and clearer, if it uses an active verb. Briefly, this means looking at the word order of the important parts of the sentence: the person, the verb and the object. In this way, “Peter watched the television” is clearer, shorter and less formal than “The television was watched by Peter”, and is preferable. Similarly, say “The team members will evaluate the project next week” rather than “This project will be evaluated by the team members next week”.
3. **Choose simple phrases and the best known synonyms.** It is better to say “water” than to say “the liquid element”. Imagine you are talking to your reader and say exactly what you mean, using words that will easily be understood.
4. **Rely on statements and textual quotations.** Including the opinions of the different stakeholders, within inverted commas and in italics, gives weight to what we are saying. It can be used to show that the statements made do not necessarily reflect the writer’s opinion, but rather the opinion of somebody in particular or of several stakeholders.
5. **Avoid the use of abbreviations,** or indicate their meaning the first time they are used. This includes abbreviations which are known by most of the (possible) readers but not necessarily by everybody, such as FAO, PTD, NGO, etc.
6. **Avoid the use of words which are not common knowledge,** even if these are easily recognisable within your institution. Not every reader will understand what we mean by “sub corridors” or “Local Operating Units”. Slang and jargon should also be avoided.

### Box 3: “Quotas”

If we think of a book as a way to present the results of a systematization process, and we think that this book may have e.g. 50 pages, then the structure presented on Box 2 could be divided as follows:

- Presentation: 1 page
- Summary: 1 page
- Table of contents: 1 page
  1. Introduction: 2 pgs.
  2. General aspects: 5 pgs.
  3. The experience: 15 pgs.
  4. Analysis: 15 pgs.
  5. Conclusions: 5 pgs.
- References: 1 page
- Annexes: 4 pages

## Box 4: Short sentences

*Which is easier to understand?*

“In this section we will describe the intervention area, the specific physical characteristics of the woodlands found in the northern provinces of Cajamarca and Lambayeque which are widely recognised as fragile ecosystems because of the almost ten months without rainfall, having therefore a very slow natural regeneration capacity...”

“In this section we describe the intervention area. The woodlands found in the northern provinces of Cajamarca and Lambayeque are fragile ecosystems with specific characteristics. This is a result of having almost ten months without rainfall every year. The woodlands therefore have a very slow natural regeneration capacity...”

7. **Use bullet points or lists to split up lots of information**, as is being done here. We have used bullet points often in this document, to try and present some ideas more clearly. This makes reading easier.
8. **Consider using graphics** such as photographs, charts, diagrams or tables. This is useful throughout the document, beginning with a map when describing the field.
9. **Be concise!**

The first draft of a document often needs additional information, or improvements on how it presents the main ideas. The best recommendation is to get as many people as possible to read this text. If somebody who was involved in the project reads it, he or she will be able to tell us if some activities have not been described. Others may be able to include their opinion or point of view about what is said in the analysis. On the other hand, if somebody who is not familiar with the project reads it, they will be able to tell us if what we have presented can be understood. In each case, there are many benefits in getting others to read this draft.

## Try this out

To really understand how to carry out a documentation process, it is best just to try it out. Many things which may seem complicated in this manual are straightforward when you actually do them. It is a case of learning by doing. Do not be afraid to have a go, learn a new method, and then you will also be equipped to learn from your experiences. Then you will be able to share them with others and enjoy all the benefits this can bring. And do not forget to send us your completed article, for publication in the *LEISA Magazine*.

Go to our website, go to the Documentation pages, look at other examples, fill in the charts, have a go and please contact us with your comments and experiences. This manual will be updated in the future, and will include the comments and experiences you share with us. We look forward to hearing from you.



Photo: Paul Van Mele

**Group work leads to better results. While in the field it may be useful to have someone taking notes during fieldwork and discussions.**

# Further reading

Abbas, D., E. Mathias, A.R.J. Montes, P. Mundy and T. Willard (eds.), 1996. **Recording and using indigenous knowledge: A manual**. International Institute for Rural Reconstruction, IIRR, Y.C. James Yen Centre, Silang, Cavite 4118, The Philippines.

Aguilar, L., J. François, A. Piepenstock and S. Quispe, 2006. **Documentación de experiencias campesinas con uso de tecnologías de información y comunicación: Un instrumento de gestión del conocimiento local en agroecología**. Fundación AGRECOL Andes, Cochabamba, Bolivia.

Ardón Mejía, M. 2000. **Guía metodológica para la sistematización participativa de experiencias en agricultura sostenible**. PASOLAC, Programa para la Agricultura Sostenible en Laderas de América Central, San Salvador, El Salvador.

Davies, R. and J. Dart, 2005. **The Most Significant Change (MSC) Technique: A guide to its use**. Version 1.00. [www.mande.co.uk/docs/MSCGuide.htm](http://www.mande.co.uk/docs/MSCGuide.htm)

Francke, M. and M. Morgan. 1995. **La sistematización: Apuesta por la generación de conocimientos a partir de las experiencias de promoción**. Materiales didácticos N° 1, Escuela para el Desarrollo, Lima, Peru

Jara Holliday, O. 1994. **Para sistematizar experiencias: Una propuesta teórica y práctica**. Centro de Estudios y Publicaciones Alforja, San Jose, Costa Rica.

Lunch, N. and C. Lunch, 2006. **Insights into participatory video: A handbook for the field**. Insight, Oxford, U.K.

Panos Institute, 2006. **Giving voice - Practical guidelines for implementing oral testimony projects: Panos Oral Testimony Programme**. The Panos Institute, London, U.K.

Selener, D., G. Zapata and C. Purdy. 1996. **Documenting, evaluating and learning from our development projects: A participatory systematization workbook**. International Institute for Rural Reconstruction, IIRR, Y.C. James Yen Centre, Silang, Cavite 4118, The Philippines.

Van Mele, P., 2006. **Zooming-in, zooming out: A novel method to scale up local innovations and sustainable technologies**. *International Journal of Agricultural Sustainability* 4(2), 131-142.



This manual is also available in the LEISA website, together with the results of its application in different contexts. This site also presents the experiences of different programmes and projects with other documentation approaches.

**Please visit <http://documentation.leisa.info>**



# Annex

On the following pages we present an example of putting this step-by-step method into practice. Team members of the Pulau Woodfuel Development Programme used this method, completing the different charts and thus looking in detail at what they did and achieved in almost ten years of work. As a result of this whole process, the following article was presented. Complemented with photographs, this article is ready to be published.



Photo: Rik Thijssen

**Intensive use of the land for agriculture and animal keeping in Pulau led to a decreasing availability of fuelwood.**

**Table 1a. Setting the boundaries**

**Fuelwood and agroforestry in Pulau.**

Title	Area / Location	Stakeholders	Starting date and duration	Objectives	Strategy / approach	Components
<p>Fuelwood and agroforestry in Pulau.</p>	<p>Four districts in the upland regions of western Pulau.</p> <p>A medium altitude area (1600 to 2000 metres) characterised by its agricultural production. With reasonably good soils.</p> <p>Good rains divided in two rainy seasons.</p>	<p>The Ministry of Energy representing the government of Pulau.</p> <p>A consultancy firm, its technical staff (management, administrative staff, field teams).</p> <p>Local population.</p>	<p>Since 1996, for ten years.</p>	<p>Make fuelwood available.</p> <p>A more efficient use of fuelwood in the rural areas.</p>	<p>Introduction of three more species with potential as fuelwood.</p> <p>Increasing the niches for planting trees.</p> <p>Agroforestry: not just fuel, but also other advantages from it.</p> <p>Introduction of cooking stoves.</p>	<p>First phase: 1996 to 2001.</p> <p>Second phase: 2001 to 2006.</p>

**Table 1b.**

<b>Context</b>	<b>Problems</b>	<b>Previous activities</b>
<p>The districts are found at a medium altitude, with adequate conditions for agricultural production.</p> <p>The population is basically dedicated to agriculture, growing food and cash crops, and also mixed farming (with many animal species).</p> <p>Highly populated areas, which is liked by farmers because of the many consumers for their products (good markets).</p>	<p>The sources of fuelwood available to farmers were rapidly decreasing.</p> <p>A general over-exploitation of the bushes and of all forested areas. As a result, women had to spend more and more time looking for fuel. At the same time, erosion was becoming very serious.</p>	<p>For several years, the Ministry of Energy has been promoting the introduction of Eucalyptus and black wattle woodlots, trying to convince farmers to plant these species and to take care of existing plantations.</p> <p>The same Ministry has been introducing stoves, trying to convince families (especially women) to replace the open fires which are commonly used.</p>

**Table 2. Describing our experience**

Components	Activities	Main achievements	Difficulties faced	Unexpected results
First phase 1996 – 2001	<ol style="list-style-type: none"> <li>1. Finding contact persons</li> <li>2. Production of seedling in nursery</li> <li>3. Establishment of woodlots</li> <li>4. Introduction of stoves</li> <li>5. Regular monitoring and evaluation</li> </ol>	<p>Many different woodlots were established, with Eucalyptus and <i>Minosa</i> as the preferred species. These were mostly liked because they grow fast.</p> <p>Only a few families used this wood for fuel.</p>	<p><i>Leucaena</i> plants had problems with psyllis.</p> <p>As plants are exotic, seeds had to be imported (and were expensive), resulting in delays and later problems with the rains.</p> <p>Cultural taboos: women not allowed to plant or manage tress.</p> <p>Communication with communities was not efficient, not participatory, contact persons were not always honest.</p>	<p>Better understanding of the multi-faceted qualities of rural life.</p>

Components	Activities	Main achievements	Difficulties faced	Unexpected results
Second phase 2001 – 2006	<ol style="list-style-type: none"> <li>1. Staff preparation</li> <li>2. Planning process</li> <li>3. Production of seedlings in nursery</li> <li>4. Training of farmers for nursery management</li> <li>5. Establishment of tress on farms (different niches)</li> <li>6. Experiment with management of trees</li> <li>7. Monitoring, evaluation and publications</li> </ol>	<p>An increasing number of trees in the area, including indigenous species.</p> <p>Increasing tree cover; wider use of these trees.</p> <p>Private nurseries in several villages.</p> <p>Fuelwood production from fence planting.</p> <p>Women more involved and empowered.</p>	-	Increased availability of water in seasonal rivers.

**Table 3. Analysis**

**Criteria 1: Participation.**

Indicators	Positive aspects	Negative aspects	Unknown aspects
Networking, collaboration with others	Integrated approach of project stimulated the involvement of others	MoE with a very narrow view	
Participation of women in the project	Their different productive tasks were considered	Still, very busy always	

**Criteria 2: Sustainability of project activities.**

Indicators	Positive aspects	Negative aspects	Unknown aspects
Documentation	Project put strong emphasis on documentation on all times		
Institutionalization	Project was always part of the MoE	MoE was hardly involved, for a long time no staff at district level	
Availability of trees for planting	Private nurseries, seed production by farmers		New seed policy that restricts production of germplasm



### Criteria 3: Environmental impact.

Indicators	Positive aspects	Negative aspects	Unknown aspects
Biodiversity	Many species planted, including indigenous species	Not always good planning – trees planted everywhere, too close, etc.	Introduction of pests, diseases
Water availability in rivers	A reduced erosion, improved infiltration		May result in conflicts

### Criteria 4: Socio economic impact.

Indicators	Positive aspects	Negative aspects	Unknown aspects
Living standards	More water, more possibilities for agriculture		
Dignity, status, satisfaction	A “green farm” gives more status. Interest of outside people to see, more value of land	Polarisation between project farmers and non-project farmers	
Income	New possibilities (e.g. selling seedlings). Tree fodder improves animal production		Possible competition among farmers
Mi gration	Some people return to the farm or to farming		A sustained trend?

## The forestry programme in Pulau

Serious over-population of the high potential, upland regions of western Pulau caused an increasingly intensive use of available land for crop production and animal keeping. One of the consequences of this was that the sources of fuelwood available to rural families was rapidly decreasing: bushes and trees on communal land which had supplied the main fuel source were disappearing because of over-exploitation, opening-up of new land for agriculture as well as browsing damage from cattle.

Women, who have always been responsible for finding firewood for household use, were forced to spend increasingly more time to secure sufficient fuel. Remaining sources of firewood were generally found far from the villages, whereas around the homesteads

only twigs and branches of low quality could be collected. This caused many difficulties in women's lives: walking long distances with heavy head-loads (women often complained about stiff or painful necks and backs), little time for social activities, leisure or even resting, while it also often caused tension in the family. Men did not like their wives to be away from the compound for too long and meals were often late or not prepared well.

### *Programme intervention*

The above analysis of the serious rural energy pressures in western Pulau, prompted the launch of the Pulau Woodfuel Development Programme (PWDP) by the national government in 1996. Funds were secured through some western donor agencies and this development programme was placed within the Ministry of Energy. This ministry lacked staff at the field level and therefore contracted a consultancy company to implement the programme. The con-

sultants decided to start in two test-districts in western Pulau, where an office was established and local staff hired. All 6 technical staff (5 men and 1 woman) had a forestry background.

The reasons for selecting the two pilot-districts, Kombo and Kangi, was mainly because these areas were heavily populated and with small farms, while families were, generally, experiencing serious fuelwood shortages. Although the inhabitants in the two districts were of two different ethnic backgrounds, their agricultural systems looked quite similar: mixed farming with dairy cows and goats as main farm animals, and main food crops being maize, beans, bananas, and cassava, with other common cash crops as coffee, tea, tobacco and sugarcane. Both districts are at medium altitude (1600-2000), experiencing two rainy seasons (the long rains from December to March and the short rains from June to August) with Kombo receiving much less annual precipitation than Kangi (respectively about 1450 mm and 1970 mm per year).

For some years, the Ministry of Energy (MoE) had already been promoting the planting of (small) Eucalyptus or black wattle (*Acacia mearnsii*) woodlots on communal land and on schools in order to increase the availability of high-calorific woodfuel. Trees of both species were known to grow fast and to be able to coppice, or in other words to withstand the harvesting of wood for fuel. Another promotional activity by the MoE had been the introduction of stoves. Women sometimes used paraffin cookers but the most common way of cooking was on an open fire with the pan placed on three stones around the fire. According to the MoE, this traditional way of cooking was not energy efficient while a good alternative was available: a small stove, made of (scrap)metal



Photo: Rik Thijsen

**Participatory rural appraisals showed that the problems were many, and multi-faceted.**

and clay, not very expensive, and transportable and therefore the stove could be used anywhere.

Apart from the on-going MoE projects, the new programme decided to focus on the introduction of three more potential firewood species (*Mimosa scabrella*, *Leucaena leucocephala*, *Calliandra calothyrsus*) and to increase the niches for planting trees from communal land and school compounds to include also private land of farming families.

#### *Action research*

Programme staff managed to establish a group of contact persons (all men) in 5 different villages in

the two districts. These contact persons were shown to the outcome of the rural energy survey that was done by the MoE two years earlier. During discussion it became clear that the selected representatives of the villages were eager to plant trees and welcomed the suggested species. It was jointly decided to order seeds of the different species and each contact person would establish a woodlot of one of the tree species on his land. Together with programme staff there would be regular monitoring of the growth of the different species on farmers' land and twice a year the results would be discussed in a district meeting, involving all contact persons as well as some other stakeholders from the 5 research-villages (village chief, village elders, etc).

It was noted that women were not directly involved in this programme activity. Roles and responsibilities were generally divided between women and men. According to local culture, planting and managing of trees was men's business, whereas women were responsible for collecting firewood and for all cooking chores. In order to also involve women in programme activities, it was decided to work with some women groups on trying out the stoves promoted by the MoE.

#### *Results and conclusions*

This programme was implemented for a period of 5 years, from 1996 to 2001. In the final year a major evaluation was carried out by programme staff assisted by an external evaluator. At that time it was noted that some of the contact persons had indeed been able to establish a woodlot on their land. Eucalypt and Mimosa scabrella were rated especially high by the contact persons since trees of these species grew very fast and straight. *Leucaena leucocephala* trees had experienced problems with psyllids while the *Calliandra* trees were regarded more as ornamental plants by the contact persons because of their bushy growth form and spectacular red flowers.

Many problems were also noted. Since all the tree species which were tried in the programme were exotic to western Pulau, planting material (seeds) had to be imported. This was rather expensive while the delivery of seeds was sometimes delayed. The result was that seedlings in the programme nursery were still too small when the rainy season would start and planting out on the land of contact persons was frequently done rather late during the rainy season. In some cases, woodlots planted by contact persons would almost completely fail because the young trees did not survive the dry season.



Photo: Karen Hampson

**Staff went through a re-orientation process, involving training and study visits, interacting actively with the population.**

There were very few experiences yet with families using firewood from the planted woodlots. Women indicated that they were not allowed to cut branches from trees on family land. On the other hand, the improved stoves were very much appreciated by the women groups that tried them. The women who cooked on these stoves

found that it was not really practical to use firewood as fuel in these stoves. However, the stoves were perfect for cooking using charcoal. Charcoal was cheaper than paraffin while the newly introduced stoves also allowed women to develop new economic activities such as cooking food on the market.

#### *Scaling-up and change in strategy*

Discussion within the consultancy company and with programme staff introduced some new insights and concepts. It was felt that the programme had been focusing too much on (planting) trees and more efficient methods of utilising energy for cooking only, as if a rural energy crisis was the only serious problem that rural families were facing. Participatory rural appraisals had discovered that the predicament of the people in western Pulau was multi-faceted: agricultural production was low, economic opportunities were few, clean water was often difficult to obtain, while education and health services were of low quality. Therefore a more integrated approach was suggested for a possible extension of the programme. Furthermore, it was recommended to introduce more participatory approaches and increase attention to gender issues.

Instead of only implementing a new strategy in the same districts, it was suggested to the donors to also start working in two other districts with the objective of spreading the programme activities that had been successful in the first phase. Donor support came through and in 2002 the Pulau Woodfuel and Agroforestry Programme (PWAP) started. The word agroforestry was added to the name of the programme as an indication for its more integrated approach. The word woodfuel still had to be maintained in the name of the programme because it was implemented under the umbrella of the MoE.

New programme staff were employed, technical staff for the new programme districts as well as a M&E and a gender coordinator for all 4 districts, while an agroforestry adviser at programme level was also contracted. All staff – old and new – first went through a process

of re-orientation. This involved training and study visits in order to increase the knowledge and capacities of the programme staff. The agroforestry notion brought new options as far as niches for planting trees was concerned (mixed with crops, along the boundary of the farm, etc) and also many other tree species were considered. The general idea was that a tree could provide more products or services than only fuel. Certain species could be tried as soil fertility improvers or as shade for crops or animals. This way the problem of low agricultural productivity could be tackled while the trees could also be used as fuel source. Farmers indicated also interest in growing fruit species because of marketing opportunities. Fruit trees would need certain pruning regimes and the brushwood could be used as firewood.

Planning of programme activities involved also farmer representatives from the four districts. During the planning process it was suggested by farmers that tree seedlings could be produced by the farmers themselves in on-farm nurseries. That would reduce the transportation distance and possible damage to the seedlings. Furthermore, some farmers recognised an opportunity to start producing seedlings for others as an economic activity.

#### *More results and conclusions*

The PWAP has also been implemented for a period of 5 years. At the end of 2006, the programme will come to an end and all remaining assets will be handed over

to the MoE. Results of programme activities during phase 2, when the programme was known as PWAP, are very promising. The successes include a growing number of tree species which are planted by farmers on their farm, including some indigenous species. Interestingly, the favoured species in the first phase of the programme (PWDP), Eucalypts and *Mimosa scabrella*, are hardly planted any more: these spe-

cies are only good for wood production and do not go well with crops or other tree species because they are very competitive. Instead, tree and shrub species that can be mixed with crops and provide families with products such as edible leaves, fruits, building poles, animal or bee fodder, green manure, and medicine, or services like shade, soil fertility improvement, and windbreaks are popular now. Seeds, or other planting materials such as cuttings, of several of these species are now plentiful available from farms in the districts.

In all villages that were involved in the PWAP programme at least one private nursery exists now where seedlings of various species are produced for selling to farmers. Women were much more involved in the second phase of the programme and, strangely enough, the main reason for that was that the focus was less on fuelwood. Women in western Pulau carry out many productive tasks in the field such as planting, weeding and harvesting of crop produce. They very much appreciate the effect that trees in the field have on the productivity of crops (green manure, mulch, shade), on the wellbeing of cattle (quality fodder, protection), but also on their own wellbeing (shade, windbreak, edible fruits, medicine, etc). This increased participation in programme activities and benefiting from the results has also improved communication and collaboration between men and women in a family. This has allowed for discussion between husband and wife(s) about the firewood problem and in many cases families have started looking for their own solutions. In some cases household money is reserved for buying charcoal for cooking on the introduced stoves. Others have planted a dense hedge of shrubs like *Calliandra* or *Buddleja* around the home compound, which is pruned once a year and after drying this yields plenty of firewood for the family.



Photo: Jorge Chavez-Tatur

**Indigenous species are now increasingly favoured, providing families with many different benefits.**

With the increasing tree cover in some areas other social, economic or environmental impacts have been noticed. Many families have become more serious farmers now that they realise that it is possible to make a reasonable living from the land. In some cases, family members who migrated to town have returned to the farm and are active in agricultural production now. Several farmers have mentioned that they feel that the intrinsic value of their farm has gone up sharply. Most of them would not consider selling their land, after all the investments made and the good results that are obtained, but if land would be sold, it would cost the buyer a lot more than before. An important environmental observation is that in many of the programme areas seasonal rivers are carrying water for a longer time during the year. This could well be caused by reduced erosion on farmer fields and improved water infiltration and retention by the soil under trees. Maybe more importantly: the increased availability of water in these seasonal rivers has considerably improved the general living standards of the families in this watershed area.

#### *Sustaining the process*

After ten years of implementation the programme will come to an end this year. The donor agencies have decided that the best phasing out strategy will be to stop and hand over all assets to the MoE. It is hoped that the coordinators from this ministry, who were recently stationed at district level because of the PWAP, will be able to provide some technical support to the communities in the former programme areas as well as any interested person or group of people who would like to learn from programme experiences.

All important experiences of the PWDP and PWAP are documented and will be made available to different stakeholders in the four districts where the programme was implemented. Apart from that, several booklets were made on specific technological issues such as nursery management, production of quality seeds, tree management, agroforestry systems, etc, all based on knowledge and experiences that result from the programme.

Much has been said and written in recent years about the need to document the experiences of the many different development initiatives taking place all over the world, and learn from the successes and failures. Unfortunately, it is rare that time and effort is put into organising, analysing and documenting experiences, for various reasons. ILEIA, the Centre for Information on Low External Input and Sustainable Agriculture, has over the past 24 years contributed to the exchange of field based information about the experiences of small scale farmers trying to improve their production in an environmentally sound manner. One of the major difficulties related to this aim has been, and remains, the lack of documentation of practical field activities taking place at community level.

We feel it is important that these activities are documented so that the lessons learnt can be used to further develop the existing knowledge on sustainable agriculture and improve the initiatives taking place in the field. If the results of such initiatives are written down and published, it becomes possible to share the information and for others to hear about the experiences and lessons learnt in a particular project.

This manual is an attempt to develop a method which will help people to document their experiences. It presents a practical step-by-step method to help describe and analyse a project, and thus document it fully. The method presented in this document is adaptable enough to be relevant for many different circumstances, for example, the process can be used to document single, short activities, projects, or for longer and more complex programmes. It can be carried out by community based groups or organisations, NGOs, networks or large institutions. We encourage you to try it out, and contact us with your comments, experiences and results.



# ILEIA

Centre for Information on Low External Input and Sustainable Agriculture